Remote Onboarding Checklist

Foreword

"After hiring the right people, studies show that the quality of their onboarding is the greatest contributor to a company's success. Ensuring that quality and consistency is now more challenging than ever, as most organisations must consider remote employees.

From 2005 to 2019, the global remote workforce grew by 140%. However, it was in 2020 that this digital-first way of working became the new normal, as the COVID-19 pandemic spread across the globe and companies had to implement work-from-home capabilities.

Our mission with Qualee is to provide an experience rich employee onboarding and engagement platform to deliver measurable employee and employer benefit, available from virtually everywhere.

Your company and brand are unique. Share exactly why with new joiners and existing staff by creating engagement experiences that are also uniquely yours. From curated journeys, branding, multimedia content, forms and e-signature to quizzes and surveys.

An important consideration in the delivery of employee experiences to a dispersed workforce is the channel through which they are communicated. Being able to extend your employer brand and intellectual assets through a secure app, built natively for mobile, is what we've enabled with Qualee.

Remote work is here to stay and businesses that want to keep up with the Future of Work need to develop a strong remote onboarding process. Implementing it will come with challenges no doubt, but with our checklist, we hope you're well equipped to face them."

Vipula Samarakoon
Founder & CEO
Qualee Technology

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Introduction

An employee's onboarding experience sets the tone for their career and journey within your company and, as an HR professional or business leader, you want to ensure that you make each new hire feel welcome and well-oriented from day one.

Until recently, for most businesses, this meant developing and following a traditional onboarding strategy, which would generally include an initial one-on-one meeting, a tour around the office, an introduction to the team, and a whole lot of paperwork.

However, as the shift to remote working continues, an increasing number of companies are compelled to rethink these traditional processes, and understand how they can be adjusted to the new reality we're living - which is exactly where remote onboarding comes in.
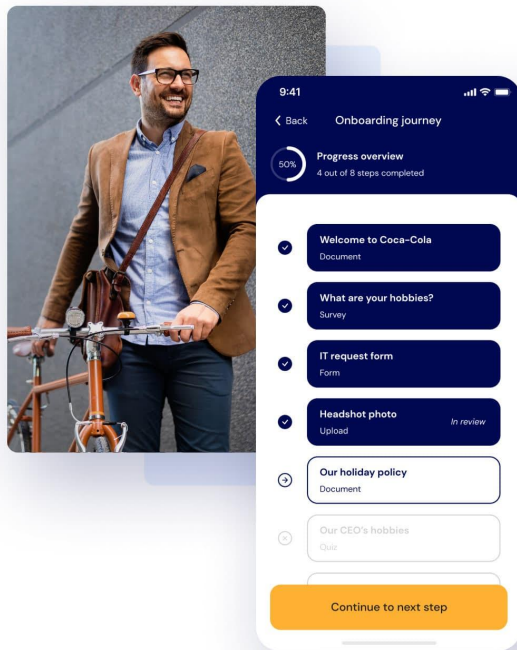
What Is Remote Onboarding?

Remote onboarding encompasses a series of tasks and procedures that businesses use to integrate and orient new remote employees, with the primary goal of making them feel comfortable in the organisation and, consequently, boost employee satisfaction and retention.

In other words, it is your usual onboarding process, but fully digital.

Before the employee begins the job

Employee retention is a problem for many companies, and so it is vitally important to begin making them feel comfortable even before they officially start employment. This is where pre-boarding comes in: it offers extra support and training to employees before their official start dates, ensuring they have all the tools they need to do their job and how to use them. It also lets the employee know the company is willing to invest in them, which will go a long way towards employee retention. Follow these steps for optimal preboarding:

Must-dos

- ☐ Send a welcome letter letting the new hire know the whole team is excited to have them joining the company, and also confirming start date, salary, and any other terms agreed upon.

- ☐ Have any necessary contracts, offer letters and other documentation reviewed and signed. Ensure that any necessary security clearance or other documentation for special circumstances is in place.

- ☐ Get the essential documents and information from the employee to set up payroll. Make sure they have a payroll schedule – it is always nice to start out knowing when and how the first salary payment will arrive.

- ☐ Have the employee review the company's benefits package and if applicable, have them select from any options available.

- ☐ Give the employee access to the employee manual and answer any questions they have about holiday pay, paid time off, or other policies.

- ☐ Review IT needs. Set up any necessary access to email, VPN, intranet, video conferencing platforms, etc., and provide any login information possible (security requirements may determine what can be distributed before the new hire is an official employee).

☐ Have the IT department configure any computer equipment or phones necessary and ship it to the employee or arrange for pickup. If possible, have the employee set up their computer equipment before the first day to make sure there are no issues with the computer, phone service, or internet connection – all critical pieces needed for a remote employee to do their job.

☐ Review company policies for remote employees – dress codes, office hours, etc. Depending on the nature of the job, schedules may be flexible and dress codes irrelevant – or they may be on video calls several time a day.

☐ Ensure the employee has contact information for their supervisor, HR, and any other essential points of contacts on the first day. Ideally, have the employee's main point of contact get in touch prior to the first day and confirm details.

☐ Create and provide the employee with a schedule for the first day.

☐ Provide the employee with any company background materials, history, training information, or other information that will be helpful in making them feel like a part of the team.

Bonus

☐ Make a welcome video from the existing staff or have co-workers video chat or send welcome messages. Creating a team atmosphere amongst remote workers can be hard, so every gesture helps.

☐ If this is the first time the employee has worked remotely, offer some tips for a professional home office setup. You want to make sure your company is being presented professionally even if employees aren't in the office.

The first day on the job

If you've followed the preboarding checklist, the new employee will have all the tools in place to do the job, know what their schedule looks like, who they'll be contacting, and a lot about the company. Now they just must start doing the job. Ensuring they know what to expect on that first day will make it a good one and set the tone for what will hopefully be many more.

Must-dos

☐ Have a welcome email in the employee's inbox first thing that confirms information given in the preboarding process, addresses any changes to the planned schedule if applicable, lets them know what to expect from the day, and provides any contact information they will need for the day's events.

☐ Send an email to the entire company letting them know the new employee's name, role, contact information, and any other applicable information. (In a very large company it may not be necessary to include everyone – the email could simply go to the employee's division or team).

☐ Provide any logins or access that could not be pre-distributed. Make sure the IT department is aware that a new team member is starting so they are available to address any issues, and make sure the employee has their contact information.

☐ Give the employee a couple of tasks to perform, but do not overwhelm them right away. Set expectations for milestones, completion dates, etc.

Bonus

☐ Schedule a team video conference as a welcome aboard. This can even take the form of a virtual team lunch or breakfast – something to break the ice and let employees put faces to names. It can be easy for remote employees to fall off the radar.

The first week on the job

After one week, the new hire has had time to meet their co-workers and experience a typical day in your company. Now is the right time to conclude all the activities from the pre-boarding period and establish a strong connection by checking in regularly.

Must-dos

- ☐ Confirm all documentation has been processed correctly. The digital preboarding process should ensure this has all gone smoothly, but sometimes during the first couple of days something may be flagged as incomplete.

- ☐ Assign someone to check in daily. This does not have to be the same person each day – it can be the employee's supervisor or a peer. This serves a couple of purposes: it ensures the new hire is not feeling neglected or bored – something that can happen easily in a remote environment – and that they are accomplishing the tasks they've been assigned. With remote employees, "checking in" may feel like "checking up" – try not to make them feel like you are monitoring their every move, while at the same time, ensuring they are meeting expectations.

- ☐ Schedule a follow-up for the end of the first week to gauge how the employee is feeling, if they have any concerns, or to learn of any issues or things that have gone better than expected.

Bonus

- ☐ Make it fun. If your company is active on social media, welcome the new hire on your page and get them actively involved and recognised by their team.

The first month on the job

This is where things start getting real. The novelty has worn off and the employee should be fairly well entrenched in the job and the company. At this point it is possible to really start getting a feeling for how they are doing in their new role.

Must-dos

☐ Have an informal performance review at the end of the first month. This does not need to be formal, as employees spend a lot of the first month just getting familiar with their role and company. Just find out how the employee is feeling and let them know how they are doing. Encourage honesty here – new hires bring fresh eyes and may point out some places you could do things differently. At the same time, let them know if there is room for improvement on their end.

☐ Make sure they have all the tools they need to do their jobs. After a month, they should have a good enough feel for their role to make suggestions for improving workflows.

☐ Ensure that payroll has gone smoothly, and everything is set up correctly.

☐ Get feedback on the onboarding process. They may have some insights or suggestions that could improve it for the next new hire.

Bonus

☐ Celebrate! Have a virtual pizza party or happy hour with the team.

The first 90 days on the job

This is a traditional probationary period for many companies and is the right amount of time to get a feel for whether things are going to work out. If all has gone well, the formerly new employee is now an integrated part of the team and has enough of an understanding of the company and its goals to really dive in and tackle bigger tasks.

Must-dos

- ☐ Have a 90-day review. This should be a formal review with standardised forms that will officially document the employee's performance. This can be a meeting with HR, a one-on-one with the manager, or a team meeting including both the manager, HR, and any other supervisors.

- ☐ Set future goals. Assuming everything is satisfactory, it's time to really chart the employee's course in the company. Set goals for the six-month and one-year mark, letting them know that you see them as part of the company's future.

Bonus

- ☐ Find out if there are any company "extras" they would like to participate in. Maybe they would like to contribute to the company blog or be part of the virtual party planning committee. Get a sense of how invested they feel.

Talk to our Team

Onboarding remote employees is more challenging than in-person staff, but with a structured onboarding program, it can be a simple and streamlined process.

Qualee is a leading cloud-based employee onboarding and engagement platform. We make it simple for companies to create exciting employee experiences that will empower your talent to be their very best. Every day.

The Qualee console has everything you need to create customised journeys, manage content and interact with your staff, who engage via an intuitive mobile app available on:

Available on the **App Store**

GET IT ON **Google Play**

GET IN TOUCH

Let us answer all your remote onboarding questions.

Qualee

Power your people. Every day.